

Charter School Application Report

Rooted School—Clark County

Recommendation for the Summer 2021 Charter Application Cycle

General Information

| | |
|-------------------------------------|---|
| Proposed Name | Rooted School—Clark County |
| Proposed EMO/CMO | CMO: Rooted School Foundation |
| Proposed Mission | Provide our students personal pathways to financial freedom |
| Proposed Grade Configuration | Opening Year: 9 th Grade Full Scale: 9 th – 12 th Grade |
| Proposed Opening | August 2022 |
| Proposed Location | Temporary location for first two years: 1780 Betty Lane, Las Vegas, NV 89156 |
| Zip Codes to be Served | 89156, 89121, 89142, 89110, 89101, 89104, 89109, 89115, 89030, 89122, and 89169 |

Process/Key Dates for Rooted School—Clark County

- March 15, 2021 – Notice of Intent is received
- April 12, 2021 – New Charter Application Training
- July 15, 2021 – Application is received
- September 21, 2021 – Clarifying Questions sent to applicant; responses received within 3 business days
- September 30, 2021 - Capacity Interview is conducted¹
- November 5, 2021 – Recommendation is presented

¹ The Rooted School – Clark County capacity interview was conducted virtually as a result of the ongoing COVID-19 pandemic and space limitations within the SPCSA’s offices.

Planned Enrollment Chart

| | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 |
|--------------|---------|---------|---------|---------|---------|---------|
| K | | | | | | |
| 1 | | | | | | |
| 2 | | | | | | |
| 3 | | | | | | |
| 4 | | | | | | |
| 5 | | | | | | |
| 6 | | | | | | |
| 7 | | | | | | |
| 8 | | | | | | |
| 9 | 90 | 90 | 90 | 90 | 90 | 90 |
| 10 | | 90 | 90 | 90 | 90 | 90 |
| 11 | | | 90 | 90 | 90 | 90 |
| 12 | | | | 90 | 90 | 90 |
| Total | 90 | 180 | 270 | 360 | 360 | 360 |

Executive Summary, Process and Recommendation

Upon receipt of a charter application, SPCSA staff reviews the submission for completion and ADA compliance. Should an application be deemed complete, it is assigned to a formal review team and moves to the independent review phase. Members of the review team read and rate each application independently and compile a list of clarifying questions in advance of the capacity interview in an effort to gather additional detail and information about the application prior to the interview. After the capacity interview is conducted, review team members rerate each section of the application against the rubric before finalizing a recommendation.

The review committee, which included one member of the SPCSA staff and two external reviewers, identified shortcomings in all five components of the submitted application. The review committee and SPCSA staff find that the proposed *Meeting the Need, Academic, Operations, and Financial Plans* do not meet the standards as outlined in the charter application rubric. Furthermore, the additional *Addendum Section* required of an application that contemplates contracting with a charter management organization (CMO) also did not meet the standard.

The review committee and SPCSA staff find that the *Meeting the Need* section of the application ‘Approaches the Standard’ as defined by the charter application rubric. While the applicant proposes a school model based on operating schools in New Orleans and Indianapolis that would offer access to industry-based credentials and work-based learning opportunities, the narrative does not outline how this unique model has been adapted to the local context. Additionally, while the applicant has the potential to demonstrate alignment to the SPCSA’s Academic and Demographic Needs Assessment, the plan does not provide credible plans for serving the anticipated student population. While the applicant has identified potential partners that would be critical to the proposed school’s success, these partnerships appear to be in the early stages of development. Input on this application was requested from the Clark County School District and is expected to be provided following the school district’s board meeting on October 28, 2021.

and will be posted alongside this recommendation.

Overall, the *Academic Plan* was rated as ‘Does Not Meet the Standard’ by the review committee and SPCSA staff. While there is limited data regarding the current Rooted Schools, the most recent rating for the New Orleans school was a ‘C’ rating on an ‘A’ through ‘F’ rating system raising questions about if the proposed school could achieve a four or five-star rating. This concern is compounded by the lack of detail throughout the academic plan, particularly with regard to how the academic program would be implemented.

Both the review committee and SPCSA staff find that the proposed *Operations Plan* ‘Approaches the Standard’ as outlined in the charter application rubric. While proposed board members bring some notable strengths, the board is lacking expertise in a few key areas, including the legal field. In addition, the application did not provide substantial evidence of demand for the proposed school. There are some noticeable gaps in the incubation year plan, particularly with regard to who will be responsible for executing the plan. Additionally, several core components of the operations plan do not include sufficient details.

The review committee and SPCSA staff find that the *Financial Plan* ‘Approaches the Standard’ as defined in the charter application rubric. While the budget appears to align to the model and is based on reasonable and justified assumptions, concerns remain regarding the financial viability of the school given the limited evidence of demand. Additionally, the budget relies on \$1.5 million in Charter School Program Grant funding that has not been secured, raising questions about how the proposed school would operate without those funds.

In accordance with Assembly Bill 419 from the 2021 Session of the Nevada Legislature, the SPCSA is required to consider the academic, financial, and organizational performance of any charter schools that currently hold a contract with the proposed CMO or EMO. This information is evaluated through the *Addendum Section*, which is required for applicants that propose to contract with an EMO or CMO. The review committee and SPCSA staff find that this section ‘Does Not Meet the Standard’ as defined in the charter application rubric. In addition to concerns regarding past performance of existing Rooted Schools the CMO does not outline detailed plans to scale to support an additional school in Clark County. The CMO also does not appear to have engaged in a thorough evaluation of readiness to expand. Finally, there are numerous issues with the proposed management agreement which raise concerns about roles and responsibilities of the CMO.

For these major reasons, in addition to those outlined throughout this document, staff’s recommendation is to deny the Rooted School—Clark County charter application.

Notwithstanding the SPCSA staff’s recommendation to deny the Rooted School – Clark County charter application, NRS 388A.255(2) provides applicants with an opportunity to resubmit their charter application. Unsuccessful applicants may resubmit their charter application to the SPCSA within 30 days after receiving written notice from the SPCSA that their charter application was denied and correct any deficiencies noted in the SPCSA’s notification. In this regard, please note that SPCSA staff typically sends out the written notification required by NRS 388A.255(2) and containing the deficiencies in the charter application within seven to ten days after the SPCSA board votes to deny a charter application.

Given the lengthy and rigorous application process utilized by the SPCSA in regard to charter applications, as well as the limited timeframe specified in NRS 388A.255(2) for an unsuccessful applicant to resubmit their charter application, the SPCSA encourages only those unsuccessful applicants that the SPCSA has found limited or specific areas where the application does not meet standards to resubmit their charter application. Unsuccessful applicants that the SPCSA has found numerous or significant issues within the application that do not meet standard are encouraged to submit a new charter application during the SPCSA’s next application window.

Proposed motion: Deny the Rooted School – Clark County application as submitted during the 2021 Summer Application Cycle based on a finding that the applicant has failed to satisfy the requirements contained in NRS 388A.249(3) and designate Director Feiden and Director Modrcin to meet and confer with the applicant.

Summary of Application Section Ratings

The State Public Charter School Authority is required to assemble a team of reviewers and conduct a thorough evaluation of the application, which includes an in-person interview with the applicant designed to elicit any necessary clarification or additional information about the proposed charter school. The SPCSA is required to adhere to its policies and practices, namely the application guidance, training and rubric, regarding evaluating charter applications. Ultimately, the SPCSA must base its determination on the documented evidence collected through the application process.

Rating options for each section are Meets the Standard; Approaches the Standard; Does not Meet the Standard. These are defined as follows:

- **Meets the Standard:** The response reflects a thorough understanding of key issues. It addresses the topic with specific and accurate information that shows thorough preparation; presents a clear, realistic picture of how the school expects to operate; and inspires confidence in the applicant's capacity to carry out the plan effectively in a way which will result in a 4- or 5-star school.
- **Approaches the Standard:** The response meets the criteria in many respects but lacks detail and/or requires additional information in one or more areas.
- **Does Not Meet the Standard:** The response is undeveloped or incomplete; demonstrates lack of preparation; or otherwise raises substantial concerns about the viability of the plan or the applicant's ability to carry it out.

The rubric is broken into four major sections, plus an addendum, as outlined below. Detailed descriptions of each rubric item can be found in the full rubric located on the SPCSA Application website:

http://charterschools.nv.gov/OpenASchool/Application_Packet/

Summary of Application Section Ratings

Rating options for each section are Meets the Standard; Approaches the Standard; Does not Meet the Standard.

| Application Section | Rating |
|--|-----------------------------------|
| Meeting the Need | Approaches the Standard |
| Mission and Vision | Meets the Standard |
| Targeted Plan | Approaches the Standard |
| Parent and Community Involvement | Does Not Meet the Standard |
| Academic Plan² | Does Not Meet the Standard |
| Transformational Change | Does Not Meet the Standard |
| Curriculum & Instructional Design | Does Not Meet the Standard |
| Promotion & High School Graduation Requirements | Approaches the Standard |
| Dual Credit Partnerships | Does Not Meet the Standard |
| Driving for Results | Does Not Meet the Standard |
| At-Risk Students and Special Populations | Approaches the Standard |
| School Structure: Culture | Does Not Meet the Standard |
| School Structure: Student Discipline | Approaches the Standard |
| School Structure: Calendar and Schedule | Approaches the Standard |
| Operations Plan | Approaches the Standard |
| Board Governance | Does Not Meet the Standard |
| Leadership Team | Approaches the Standard |
| Staffing Plan | Meets the Standard |
| Human Resources | Approaches the Standard |
| Student Recruitment and Enrollment | Does Not Meet the Standard |
| Incubation Year Development | Approaches the Standard |
| Services | Does Not Meet the Standard |
| Facilities | Approaches the Standard |
| Ongoing Operations | Approaches the Standard |
| Financial Plan | Approaches the Standard |
| Addendum | Does Not Meet the Standard |
| Leadership for Expansion | Does Not Meet the Standard |
| Scale Strategy | Does Not Meet the Standard |
| School Management Contracts | Does Not Meet the Standard |
| Charter Management Organizations Applying Directly | Meets the Standard |

² The Rooted School—Clark County proposal did not contemplate Distance Education or Pre-Kindergarten. Therefore, the corresponding sections of the rubric were not scored.

Meeting the Need Section

The applicant proposes school model, based on schools located in New Orleans and Indianapolis, that is focused on ensuring that students can compete in high-growth, high-wage industries. In addition to traditional courses, the program includes opportunities for students to earn industry-based credentials and participate in work-based learning. While this model would provide a unique high school experience for students in Clark County, the narrative fails to establish how the proposal has been adapted to meet the needs of the local community.

The application identifies 11 zip codes that the proposed school intends to serve, though the narrative does not provide a clear rationale for selecting these communities. While the application conveys a strong commitment to serving North Las Vegas's most at-risk learners, the application only partially aligns to the needs identified in the SPCSA's Academic and Demographic Needs Assessment because questions remain regarding the plans for serving this population. In addition, the narrative does not establish how community members, including perspective parents and students, have shaped the proposal. Finally, partnerships to support the proposed school and its students remain in the early stages of development.

For these reasons, as well as those detailed further below, the review committee and SPCSA staff rated this section as 'Approaches the Standard.'

Areas of Strength

- The applicant states that the proposed model is designed to allow financial freedom for students as part of the school's mission. As further described during the capacity interview, the model aims to ensure that students leave high school ready for college or to immediately enter the workforce in a high-demand, high wage industry. The model includes a focus on ensuring students earn industry-based credentials and participate in internship opportunities. Additionally, the application aims to fulfill the six statutory purposes of public charter schools in Nevada.
- Throughout the proposal, the applicant demonstrated a commitment to meet at least one of the identified demographic and academic needs as defined by the most recent SPCSA Academic and Demographic Needs Assessment. The application states that it will serve the most at-risk and diverse students in Nevada, and anticipates educating a high population of students qualifying for free or reduced-price lunch and English learners.

Areas of Concern

- While the application sets forth an ambitious and meaningful mission, the narrative does not provide a clear connection between the proposed school and the community that the school intends to serve. The narrative includes some analysis of Clark County wide data but doesn't demonstrate an understanding of the zip codes identified to be served.
- The application does not provide evidence of demonstrated capacity, credible plans, and thorough research and analysis in order to intentionally serve the identified student populations in Las Vegas, prevent at-risk students from dropping out, and/or provide more high-quality schools in underserved areas, as defined in the SPCSA Academic and Demographic Needs Assessment. While the applicant team spoke about some work that has been done to adjust the model to meet the needs of what is expected to be a larger population of English learners than is served by the other Rooted Schools in New Orleans and Indianapolis, significantly more information is needed to better understand how the applicant team plans to use the proposed model to serve students, particularly those from identified zip codes.
- During the capacity interview, the applicant indicated that local partners typically play three important roles in supporting the students and school: 1) advising on industry-based credentials, 2)

providing work-based learning opportunities for current students, 3) hiring graduates. While the applicant team has secured support from a number of community groups, letters included in the application are not specific and do not outline commitments of the proposed partners. During the capacity interview, the applicant team reiterated that most of this work was in the early stages and that partnerships would be solidified after authorization. While it is reasonable that partnerships would deepen and expand over time, it does not appear that any partners have committed to supporting the school, even in the initial stages of advising on industry-based credentials. More evidence is needed to understand how the school plans to work with proposed community partners so as to ensure that these partnerships are likely to be impactful.

- The written application and capacity interview did not provide a clear picture of why the applicant team chose the 11 zip codes identified in the application as the communities to be served. While all but one of the identified zip codes have one- or two-star schools, only four of them contain one- or two- star high schools. More information is needed to understand how the applicant team determined that the proposed model presents a high-quality option for the zip codes to be primarily served by the school.
- While the narrative indicates that the CMO has engaged with over 100 community leaders and stakeholders, limited evidence is provided in the application to conclude that the applicant team has incorporated the voices of parents and community members in the proposal. During the capacity interview, the proposed principal indicated that his conversations have illuminated an interest in the model, and that parents are looking for a school and school staff that they can trust. However, the application fails establish that the local community has helped shape the proposal. This is also manifested in the lack of demonstrated student interest in the application.

Academic Section

The proposed academic program is modeled after the Rooted Schools in New Orleans and Indianapolis. While the Indianapolis school is yet to be rated, the New Orleans school was most recently rated as a 'C' on an 'A' through 'F' rating system. Though student growth is a strength at this school, past performance coupled with the fact that the academic plan is underdeveloped raises questions about whether the proposed school could achieve a four or five-star rating on the Nevada School Performance Framework (NSPF). While the capacity interview provided some insight into how the proposed school would regularly review data, there is not a comprehensive and coherent assessment and data monitoring plan. In addition, the application is lacking detail in a number of key areas, including meeting the needs of at-risk students, establishing a strong school culture, and addressing chronic absenteeism and truancy.

For these reasons, as well as those detailed further below, the review committee and SPCSA staff rated this section as 'Does Not Meet the Standard.'

Areas of Strength

- The application presents a clear system and structure for how teachers are to be evaluated. The proposed school intends to adopt the Danielson Framework and will work with teachers to develop SMART goals. Through these structures, school leaders will provide feedback and support to those teachers that may require assistance or additional coaching.
- One unique aspect of the proposed program is the Green Balloon Fellowship, a one-year program that enables a student to matriculate directly into work with a local employer within a STEM field. This ties directly to the school's mission and vision, and can help ensure that Rooted School – Clark County graduates are college and career ready.
- The written application describes restorative practices as the foundation for the student discipline plan. The narrative also provides details about how the proposed school would disaggregate discipline data and monitor for trends in order to ensure that the school's discipline approach is fair and equitable. These approaches demonstrate strong alignment to the mission and vision of the school.

Areas of Concern

- While the proposed model may have potential for transformational change and a high-quality school for students, the application did not paint a picture of a compelling theory of change, nor was sufficient evidence provided to demonstrate that the Rooted School – Clark County school will be rated as four- or five-stars. The current Rooted school in New Orleans is rated as a 'C' school while the school in Indianapolis has yet rated under the state accountability systems. Significantly more evidence and information are needed to determine if the proposed school has an achievable plan to be rated as a four- or five-star school in Nevada.
- Instructional strategies for English learners are underdeveloped, and the existing Rooted Schools both serve a comparatively smaller population of English learners than is expected in the proposed Clark County school. During the capacity interview, CMO representatives indicated that there is work to do in order to ensure that English learners are adequately supported, and cited the affiliate school in Vancouver, WA, which is scheduled to open in the fall of 2022, as a potential partner given the expected English learner population. This is concerning given the high English learner student population in the Las Vegas area. More information is needed to understand how the proposed school will support English learners to proficiency across all subject areas.
- While the application identifies several instructional strategies, details regarding how these instructional strategies are suited to the expected population are lacking. In addition, the narrative

outlines plans for coaching and evaluating teachers, but does not show how professional development directly connects to the proposed instructional methods and curricula.

- While the narrative lists a number of strategies for supporting students who are at risk of dropping out, there are not sufficient details regarding how these strategies would be implemented. While the June school concept has potential to support credit recovery and remediation, the overall plan for student support is lacking detail.
- The partnership to offer dual credit courses is underdeveloped, which is concerning as Rooted School – Clark County is a proposed high school. When asked for additional information to substantiate the dual credit partnership, a general letter of support from a college was provided, far short of a detailed, draft memorandum of understanding regarding a potential dual credit partnership. The narrative sets forth a timeline for developing a memorandum of understanding by the 2024-25 school year, which is two years after the applicant proposes to open.
- Minimal information is provided in the narrative regarding how the proposed school will collect, analyze or use data regularly to ensure every student is successful. The application includes very little information about how teachers, school leadership and the CMO will use data to help drive remediation for students or be used for professional development for teachers. Information about data dives was discussed during the capacity interview, but more information is needed to determine if there is a clear process in place for setting, monitoring and/or revising internal indicators.
- There is not a clear delineation between assessments utilized for internal monitoring by the governing body, staff, and leadership and those which are sufficiently rigorous, valid and reliable to be presented to outside stakeholders. While the narrative identifies a number of evaluation tools, including assessments that appear to align to college and career readiness, and references the use of formative and summative assessments, no information is provided about how these identified assessments are used together throughout the year to understand the overall picture of student learning. Overall, the assessment plan is not sufficiently detailed.
- While the application states that teachers and staff will be appropriately trained, the application does not provide a detailed plan for professional development for teachers and staff to ensure they can support and accelerate the learning of at-risk and special population students.
- The *Academic Plan* is lacking details about how the proposed school would implement programs to support at-risk students, students with disabilities, and English learners. In particular, the narrative frequently fails to describe specific protocols and procedures or identify responsible parties. For example, the section on serving homeless students indicates that homeless students will be identified during the registration process and that a staff member will be trained to be the McKinney-Vento liaison. However, no additional details regarding this plan are provided. Additionally, the narrative includes a few sections of relevant text that are referenced but not explained. For example, the application lists the Nevada English language development standards but does not explain how they will be incorporated into the supports for English learners.
- The application does not present well-defined school culture goals or plans to monitor progress. Insufficient evidence is presented in the application to conclude that the school has a clear plan to sustain a strong school climate which would allow for the fulfillment of the proposed school's mission and vision. In addition, it is not clear that the proposed school has a concrete plan for norming social/cultural expectations. The application notes that students will be onboarded in advisory periods and in response to clarifying questions, the applicant indicated that a three-day orientation is provided for students. However, the details of this onboarding are not provided.
- While the application provides sound policies for student discipline that are grounded in restorative practices, it does not discuss suspension or expulsion, including due process. In addition, the application does not set forth any student behavior goals for the proposed school.

- The applicant did not provide any information on chronic absenteeism or drop out policies that the proposed school would follow if there were issue with attendance. This raises significant questions and concerns as student dropout is most prevalent at the high school level. Insufficient information is presented within the application to conclude that the proposed school has thorough plans for monitoring attendance or has procedures to address truancy concerns.

Operations Section

While the proposed board includes members with expertise in a range of areas including education, fundraising, and community outreach, there are noticeable gaps in the areas of legal expertise, as well as human resources and facilities. Additional evidence is needed to demonstrate that the board has a clear understanding of how they will define success and manage the relationship with the proposed CMO.

Despite outreach to community stakeholders, the applicant provided limited evidence of demand for the proposed school. In addition, while the incubation year captures a number of key milestones for a successful school launch, there are questions about who will be responsible for this work and how the board will monitor progress. The operations plan is also lacking detailed plans in a number of areas including school leader coaching and development, enrollment and lottery procedures, and services.

For these reasons, as well as those detailed further below, the review committee and SPCSA staff rated this section as 'Approaches the Standard.'

Areas of Strength

- The application notes that the leadership team, comprised of proposed leaders from the CMO and school, has over 70 collective years of experience and expertise, and that they have successfully launch two other Rooted Schools. The proposed board possesses a great deal of experience in academics and education.
- The application outlines the function of employees in year zero and the incubation year planning table identifies key milestones as well as the responsible party and deadlines for each activity.
- While there were some discrepancies identified between the staffing plan and budget, in response to clarifying questions, the applicant was able to provide information to confirm alignment between the staffing model and budget.
- The narrative outlines a clear picture of the type of staff members and teachers the proposed school seeks to hire. In addition, several strategies are identified for supporting and developing less experienced teachers.
- The application has provided some evidence that a prospective, short-term facility for Rooted School – Clark County has been identified. The proposed facility currently houses Nevada Prep, another SPCSA sponsored charter school, and this entity has provided a letter noting that they are open to leasing a portion of their building.

Areas of Concern

- While the individuals that have been identified for the board have years of relevant experience in a few areas, the board member roster indicates that none possess legal, facilities, or human resources expertise. Additionally, minimal details are provided regarding how future board recruitment will occur.
- During the capacity interview, CMO representatives acknowledged that there have not been any conversations with the proposed board about the capacity of the Rooted School Foundation to expand and support the proposed school in Clark County. While CMO representatives were able to point to some factors that lead them to believe they are ready to grow, this is a major concern as the Rooted Foundation is relatively young, and currently supports two operating schools and one school that is planned to open in the next 12 months, all in different states. Ultimately, it's not clear that the CMO nor the board have examined the readiness of the Rooted School Foundation to support an additional school in Clark County.
- The application does not articulate a clear set of fully developed, ambitious, data-driven set of standards and criteria that the board may use to determine if the school is on track to achieve its

vision. Most proposed board goals are based on completion, raising questions about how the board will effectively oversee the proposed program. The narrative mentions the use of an online platform for the board to house board packets and the organization's key performance indicators, but no detail is given on what those indicators will be.

- The application notes that the Rooted leadership team has demonstrated industry-defying success in school innovation and start-up because of its ultimate commitment to building schools in partnership with the community. However, evidence of established, fully developed community partners in Clark County was not presented in this application, and the proposed board and CMO acknowledged during the capacity interview that this work is still being conducted and would be solidified should the proposed school receive a charter. More evidence of community ties and partnerships in Clark County is needed to assess if the CMO and proposed board are prepared to launch a school in Las Vegas.
- While the narrative provides some high-level information on how the school leader would be evaluated using the Leadership Practices Inventory and annual goals, the narrative does not provide much information regarding coaching and support for the school principal. There are references to support from the Rooted School Foundation as well as executive coaching, but the application is lacking a comprehensive plan for coaching, support, and evaluation of the school leader.
- While the narrative indicates that EdOps, a third party back-office provider will assist with payroll, limited information is provided regarding other core human resource functions such as benefits administration and ensuring employment eligibility, including background checks.
- The proposed enrollment plan provides general information about recruitment and offers a sample of strategies that the school would use, but few specific details regarding Nevada context are included. Additionally, no information regarding the lottery process is detailed in the application. When asked about the plan for the lottery during the capacity interview, the applicant team did not articulate a consistent plan for executing a lottery, at one point indicating that the school would not conduct a lottery.
- The initial application included evidence of three students who have shown interest in the school. During the capacity interview the applicant indicated that demand is now at approximately 38 students. However, this is well below the projected first year enrollment and the capacity interview confirmed that there had been minimal engagement with the community to be served prior to the submission of the application. It is not clear that the school can be viable based upon the low student and family interest presented in the application.
- More information is needed to fully understand the execution plan during the incubation year. Most incubation year milestones are assigned to CMO staff or the school leader, but clarity is needed about how the governing board will oversee the completion of these important tasks to ensure a successful launch. While a draft services agreement with a start date of January 1, 2022 was provided, details regarding the services to be provided are lacking and it is not clear that the proposed school has sufficient funds to meet the monthly costs outlined in this agreement. Additionally, the narrative is lacking a comprehensive leadership development plan for the incubation year, and it is not clear when critical teacher professional development will occur.
- The incubation year plan indicates that the school leader, director of operations, and director of CTE are expected to work full or part time during the incubation year. However, the budget accounts for the school leader to be full time, the director of operations to be part time, and does not include funding for the director of CTE during the incubation year. In addition to this discrepancy, the funding for these positions has not been secured. Without funding, it's not clear that the incubation plan can be successfully completed.

- The application does not provide detailed, logical plans for all essential and program-specific, non-academic services. While some general information is provided about food services, information technology, transportation as well as some potential contractors, the narrative is lacking a comprehensive plan for services.
- The application does not identify a viable, long-term facility option, nor does it outline in detail the plan and timeline to identify and secure facilities as needed. The application goes on to state that there is confidence a facility will be in place following charter authorization, based on its past ability to secure facilities in two distinct regions.
- While high-level information is provided regarding the proposed school's approach to school safety, the narrative is lacking details as to how the plan will be developed to align with state requirements.

Financial Section

Overall, the applicant presented a budget that aligns to the proposed model and is based on reasonable assumptions. The proposed board intends to contract with a back-office provider to support with financial management and accounting services. However, concerns remain about the limited student demand and the potential impacts of under enrollment on a budget that projects a limited surplus in the first few years of operation. Additionally, the budget assumes that the proposed school receives \$1.5 million in startup funding from the Charter School Program grant which has not yet been awarded. As presented, the budget is not viable without this grant funding.

For these reasons, as well as those detailed further below, the review committee and SPCSA staff rated this section as 'Approaches the Standard.'

Areas of Strength

- The school leader and a national third-party contracted provider, EdOps, will be responsible for the financial management of the school. Sufficient detail was provided to demonstrate a working knowledge of financial procedures and internal controls including segregation, though the threshold for board approval on purchases is \$25,000, which is higher than most SPCSA-sponsored charter schools.
- Overall, the budget appears to appropriately account for all critical expenses, including model-specific expenses. The budget provides sufficient detail to support the cost assumptions and while transportation plans are not thoroughly detailed in the narrative, does incorporate projected expenses to provide school bus transportation.

Areas of Concern

- Given the concerns previously noted regarding enrollment and student demand as well as the fact that the budget projects a very small surplus in the first few years of operations, questions remain about the financial viability of the proposed school. While the applicant indicated during the capacity interview that the proposed school may be able to operate at 50% enrollment with half as many teachers, there's not sufficient evidence that this is a viable option.
- The budget is dependent upon receipt of the Charter School Program (CSP) grant over the next four years for a total of \$1.5 million, but the school has not received the award yet. When asked about the possibility that the proposed school would not be awarded the CSP grant, the CMO and school board acknowledged that the budget would need to be reexamined.
- As noted in the *Operations Section*, the incubation year plan indicates that the school leader, director of operations, and director of CTE are expected to work full or part time during the incubation year. However, the budget accounts for the school leader to be full time, the director of operations to be part time, and does not include funding for the director of CTE during the incubation year. In addition to this discrepancy, the funding for these positions has not been secured. Without funding, it's not clear that the incubation plan can be successfully completed.

Addendum

In accordance with Assembly Bill 419 from the 2021 Session of the Nevada Legislature, the SPCSA is required to consider the academic, financial and organizational performance of any charter schools that currently hold a contract with the proposed CMO or EMO. Information gathered through the Addendum Section examines the past performance of affiliated charter schools, as well as readiness of the CMO or EMO to expand and the specific services that are to be provided to the proposed school.

The proposed board intends to contract with the Rooted School Foundation, a charter management organization (CMO), to replicate the Rooted School model that started in New Orleans. However, the narrative does not provide clear evidence that the CMO is ready to expand to support the proposed Clark County school, particularly given the recent expansion to Indianapolis and the planned expansion to Vancouver, Washington. The most recent rating for the New Orleans school was a 'C' on an 'A' through 'F' rating scale and no other Rooted Schools have sufficient data to be rated. Additionally, the plan to scale the model is lacking details.

The proposed management agreement has a number of issues, including conflicting information within the draft as to the term of the contract, lack details regarding the services, and some terms that may not be permissible under Nevada statutes and regulations.

For these reasons, as well as those detailed further below, the review committee and SPCSA staff rated this section as 'Does Not Meet the Standard.'

Areas of Strength

- The most recent audits of the existing schools which contract with Rooted School Foundation show no material findings and the financial health of these schools appears to be strong.

Areas of Concern

- While the narrative identifies some specific achievements of the Rooted School in New Orleans, the most recent ratings from Louisiana indicated that this school was rated as a 'C' on an 'A' through 'F' rating system. During the capacity interview, CMO representatives noted that they did not use a greenlighting tool when examining their own readiness to expand to Clark County even though a blank copy was included in the application. During this discussion, a few indicators were noted, namely from the Rooted School – Indianapolis, but it remains unclear if the CMO has a comprehensive process for evaluating its own readiness for expansion. Insufficient evidence is provided that the CMO is ready to expand.
- There is not enough data to assess if the plan to scale the Rooted model to new sites is adequately resourced and staffed appropriately. Information provided does not explain how the organization will be scaled to support the newest school in Washington and how that expansion impacted the capacity of the CMO. The Rooted School Foundation does not provide evidence that it has sufficient infrastructure to support the growth of the network of schools.
- The narrative indicates that the Rooted School Foundation will leverage its learnings from growth in Indiana and Washington in order to launch the proposed school in Clark County. However, no details are provided regarding the successes or areas for improvement from these previous expansions. Additionally, limited evidence is provided to demonstrate that these expansions have been successful, and the school in Washington has yet to open.
- The academic data for currently operating schools affiliated with the Rooted Foundation shows that both the Indianapolis and New Orleans schools serve few English learners. This raises questions about the proposed school preparedness to effectively serve English learners, which are likely to constitute a larger percentage of the student body in Las Vegas. While the application

emphasizes the importance of serving these students, additional information is needed to establish how the proposed school would successfully serve this student population.

- The proposed services agreement between the school and Rooted School Foundation appears to cover the six months leading up to the opening of the proposed school through the first year of operation. However, the proposed agreement has conflicting information regarding the termination date for the contract. Additionally, the services outlined in the contract only appear to cover the pre-opening year, raising questions about what services will be provided if the school were to be approved and successfully open. In response to clarifying questions, the applicant indicated that following the termination of this initial contract, that the Rooted School Foundation would continue to provide support with curriculum, CTE programming, and technology planning and integration for a fee of 3% of revenues. However, this is not sufficiently detailed to evaluate the terms of service. Significantly more information is needed to understand the roles and responsibilities between the management organization and school site, as well as most contract terms.
- The proposed services agreement establishes a fee of \$10,500 per month beginning on January 1, 2022, but indicates that the source cannot be Charter School Program grant funds. No additional information is provided about the source for this funding. Based on the information provided, it is not clear that the proposed school would be prepared to pay for the services as outlined in the contract since limited funding has been secured for the incubation year.
- The proposed services agreement indicates that the CEO of the Rooted School Foundation will serve as the board chair for the school until a replacement is approved. While this is not reflected in the application narrative, this arrangement would present a conflict of interest and would not be permissible under Nevada laws and regulations.
- While the narrative includes images of a survey to rate the performance of the Rooted School Foundation, no details are provided regarding the process for the proposed board to evaluate the CMO and there does not appear to be full alignment between the survey and the services identified in the proposed contract.

Capacity Interview Summary

Based on the independent and collective review of the application, the review committee conducted a virtual capacity interview of the applicant to assess the capacity to execute the application’s overall plan. The capacity interview for Rooted School – Clark County was conducted on Thursday, September 30, 2021 and lasted approximately 120-minutes. All proposed board members, the proposed school leader, and several representatives of the CMO attended the interview. Additionally, one representative from EdOps, a potential back-office contractor, attended the capacity interview. Questions during the capacity interview focused primarily on these areas:

| | |
|--|------------------------------------|
| Targeted Plan | Board Governance |
| Parent and Community Involvement | Leadership Team |
| Transformational Change | Staffing Plan |
| Curriculum & Instructional Design | Human Resources |
| Driving for Results | Student Recruitment and Enrollment |
| At-Risk Students and Special Populations | Financial Plan |
| School Structure: Calendar and Schedule | Leadership for Expansion |

Prior to the capacity interview, the review committee sent the applicant team a list of clarifying questions to provide an additional opportunity for details and information to be presented. These responses were considered by the review team, and were used to better inform the capacity interview.

Lastly, the capacity interview included a scenario-based question that probed the applicant team’s capacity to develop a plan in response to under enrollment in the first year of operations.

District Input

Per Assembly Bill 462 (2019), now codified in NRS 388A.249, the SPCSA solicited input from the Clark County School District regarding this application.³ The timeline regarding this request for input is below and the response provided by the Clark County School District is attached.

- August 5, 2021 – Memo sent to CCSD soliciting input.
- The SPCSA expects to receive input following the CCSD board meeting scheduled for October 28, 2021. This input will be posted alongside this recommendation.

³ NRS 388A.249(2)(a): “The proposed sponsor of a charter school shall, in reviewing an application to form a charter school...If the proposed sponsor is not the board of trustees of a school district, solicit input from the board of trustees of the school district in which the proposed charter school will be located.”

Appendix (Rubric Detail)

The information below indicates *rubric criteria that the applicant did not substantially meet*.

Meeting the Need

- Targeted Plan

- *Clear and compelling rationale for the selected community based on academic or demographic need*
- *Clear and comprehensive explanation of how the proposed model meets identified community needs*
- *Demonstrated capacity, credible plans, and thorough research and analysis in order to intentionally serve the identified student populations, prevent at-risk students from dropping out, and/or provide more high-quality schools in underserved areas, as defined in the Academic and Demographic Needs Assessment.*

- Parent and Community Involvement

- *Demonstrates clear evidence of the involvement of parents, neighborhood, and/or community members representative of target population in the development of the plan. The application establishes that the local community has helped shape the final school proposal.*
- *The committee to form demonstrates their ties to and/or knowledge of the target community.*
- *Outlines plan to effectively engage parents, community members, and other neighborhood partners from the time that the operator is approved (e.g., conducting home visits, community meetings, etc.) and once the school is operating (e.g., parent advisory council, student placement, trainings, communications, volunteers, etc.)*
- *Identifies specific partnerships which are shown to be relevant to the needs of the target population, including partners located in the community that the applicant intends to serve.*
 - *Partnerships are evidenced by specific letters of commitment outlining the accountabilities of both parties and clear, measurable, time-specific deliverables from the partner which are clearly relevant to the needs of the target population.*

Academic Plan

- Transformational Change

- *Compelling, well-articulated theory of change and clear educational strategy aligned to the mission and critical to the schools' success*
- *The committee to form demonstrates with an ambitious, yet achievable plan that they will be able to:*
 - *Provide families with high quality schools: the SPCSA aims for a majority of schools to be rated as 4- or 5-stars.*
 - *Ensure that every SPCSA student succeeds - including those from historically underserved student groups: the SPCSA aims for all sponsored schools to demonstrate strong academic growth, high levels of proficiency, and on-time graduation across all student groups, including historically underserved student groups.*
- *Distinguishing features of the proposed schools are supported by compelling evidence of success in schools implementing similar programs serving a similar target population.*
- *The committee to form provides a specific description of how the proposal will be*

- *The partnership reflected in the memorandum of understanding is shown to be both appropriate for high school students seeking advanced coursework as well as financially accessible to all students.*
- **Driving for Results**
 - *There is a clear process for setting, monitoring and/or revising internal leading indicator academic goals.*
 - *There is a clear delineation between assessments utilized for internal monitoring by the governing body, staff, and leadership and those which are sufficiently rigorous, valid, and reliable to be presented to the Authority, the state, parents, and the general public.*
 - *Internal assessment selections will provide sufficiently rich data for evaluation of the education program AND fully align with State assessments, State Standards, and the curriculum as presented.*
 - *The assessment plan is sufficiently detailed to demonstrate collection and analysis of individual student, student cohorts, school level, and network- level performance over time (interim, annual, year over year), including a clear process for setting and monitoring ambitious academic goals.*
 - *Demonstrates the validity and reliability of any internal non-standardized assessments, as well as how these assessments are aligned with the school design and high expectations.*
 - *Articulates process for utilizing data to support instruction and providing adequate training to teachers and school leaders.*
 - *Articulates plan for monitoring for academic performance gaps and concrete steps to address identified gaps.*
 - *Sound plan for measuring and reporting academic performance and progress of students for both individual schools and the network (if applicable).*
 - *Explains how both individual schools and the network staff will use assessment data to drive key decisions aimed at improving academic outcomes (if applicable).*
- **At-Risk Students and Special Populations**
 - *Provides a detailed plan for appropriate professional development to teachers and staff to ensure they can support and accelerate the learning of at-risk and special population students which is aligned to the budget and overall PD plan.*
 - *Outlines plans to promote parent participation among parents of at-risk students, students with disabilities and English Language Learners.*
 - *The school assigns clear responsibility for communicating with parents regarding remediation needs.*
 - *The committee to form presents a plan for developing IEPs that contain rigorous goals and instructional plans that are suitable to meet those students' goals.*
 - *The group's plan for SWDs must identify the staff members who will lead student evaluations, IEP development, and provision of ongoing service. Relevant job description(s) require(s) the expertise and/or credentials relevant to the services.*
 - *The committee to form outlines comprehensive and logical plans to train staff in modifying the curriculum and instruction to address the unique needs of students with disabilities.*
 - *Ensures that the rights of students with disabilities are protected with regard to discipline.*
 - *Articulates requirements and processes for monitoring services to students in need and plans to exit students who attain sufficient progress.*
 - *Processes for identifying English Language Learners are well-defined, including administration of placement assessments and communications to parents and teachers.*
 - *ELL staffing aligns with qualifications required in statute:*

- *Full Nevada licensure for all ELL teachers/coordinators (no waivers or substitutes).*
- *Describes the specific services that will be provided for students within and outside the classroom, including curriculum and instruction and exposure to co-teaching.*
- *Devotes adequate resources and staff to meeting the needs of all students.*
- *The timeline/plan according to which the school will assess and meet the needs of students identified as homeless and/or migrant demonstrates that students will begin receiving required services within their first semester of arriving at a new school.*
- **School Structure: Culture**
 - *Appropriate and effective strategies to support a school climate that will allow for fulfillment of the school's stated mission and vision, as well as the school's stated academic goals.*
 - *Describes a concrete plan for norming social/cultural expectations at the start of each semester as well as for students who enter mid- semester.*
 - *Plan to establish a culture of high expectations with students/families and teachers/staff and promote positive behavior.*
 - *Well-defined goals around school culture and plans to monitor progress.*
 - *Research-based and age-appropriate strategies to support students' social and emotional needs.*
 - *Dress code and/or uniform policy is age-appropriate, and the applicant articulates how the proposed school will ensure that uniform requirements do not create a barrier for students in poverty.*
- **School Structure: Student Discipline**
 - *Presents sound policies for student discipline, suspension, and expulsion including procedures for due process.*
 - *Goals for student behavior are clear and measurable; there is a plan, and designated personnel, for monitoring and reporting related to behavior goals as well as ongoing maintenance of discipline records.*
 - *Student behavior plan integrates clear, logical use of methods of restorative justice per Assembly Bill 168 (2019).*
- **School Structure: Calendar and Schedule**
 - *Outlines meaningful goals for student attendance and plans to monitor and adjust as needed.*
 - *Presents sound policies for student attendance and truancy including procedures for due process that comply with state law and regulation and are customized to the charter school.*

Operations Plan

- **Board Governance**
 - *Proposed governance structure is likely to ensure effective governance and meaningful oversight of school performance, operations, and financials. The proposed governing body demonstrates capacity and expertise to successfully oversee a school.*
 - *Clear delineation of authority and working relationship between the governing body and school staff.*
 - *Demonstrates that the membership of the governing body will contribute the wide range of relevant knowledge, skills, and commitment needed to oversee a successful charter school, including but not limited to educational, financial, accounting, legal, and community experience and expertise, as well as special skill set to reflect school-specific programs, if applicable (e.g., STEM, fine arts, blended learning, alternative programs, etc.)*
 - *Qualifications and experience levels of governing body members with legal*

experience significantly exceeds the statutory minimum requirements and demonstrates a proven track record of successful management or oversight of complex, high risk/high profile legal matters.

- *Qualifications and experience levels of governing body members with human resources experience significantly exceeds the statutory minimum requirements and demonstrates proven track record of successful management or oversight of a human resource function or process in a mid- sized to large employer with staffing levels equivalent to those of the school at full capacity.*
- *Provides plans for meaningful, appropriate training for board members on a reasonable basis. Training is provided by experienced, third parties and contemplates on-boarding for new members, or when the composition of the board changes.*
- *Goals are clear and measurable, and contribute to improved academic outcomes for students and overall advancement of the organization*
- *The board puts into place a structure that enables it to collect the information it needs to evaluate the EMO/CMO, if applicable.*
- *The board articulates a clear, ambitious, data-driven set of standards and criteria that the school leader must satisfy in order to keep the school on track to achieve its vision.*
- *The board provides logical evidence that the school will achieve its target student outcomes pursuant to the NSPF and the SPCSA Performance Framework outcomes pursuant to the NSPF and the SPCSA Performance Framework if the school leader satisfies the standards set forth by the board.*
- **Leadership Team**
 - *The leadership accomplishments of the school leader or leadership team are demonstrable with empirical data related to student performance as well as the recruitment, hiring, and development of a highly effective staff.*
 - *The organizational chart clearly indicates all positions delineating board and management roles and lines of authority.*
 - *Structure and leadership job descriptions demonstrate effective assignment of management roles and distribution of responsibilities for instructional leadership, curriculum, personnel, budgeting, financial management, management of state categorical revenue streams, special education and ELL programming, legal compliance, state reporting, external relations, and any unique, school-specific staffing needs.*
 - *Provides a comprehensive plan for coaching, support and evaluation of school leadership.*
- **Human Resources**
 - *School staffing structure that ensures high-quality teacher support/development, student/family support, effective school operations, and compliance with all applicable policies and procedures.*
 - *Essential functions and processes, including background checks, payroll, benefits, and employee relations, are accounted for.*
- **Student Recruitment and Enrollment**
 - *The enrollment plan reflects an understanding of the Nevada context.*
 - *The enrollment plan, including annual growth, is reasonable and supported by a clear rationale.*
 - *The enrollment plan prioritizes the academic achievement of students above other factors*
 - *The enrollment plan addresses lotteries, weighted lotteries, enrollment preferences, student attrition and mandatory backfilling.*
 - *The enrollment plan is aligned with the staffing plan and budget, including projected*

recruitment expenses.

- *Articulates proactive plan for recruiting eligible students to the school and describes specific actionable steps for ensuring the school is fully enrolled.*
- *Includes outreach and recruitment strategies that demonstrates an understanding of the community likely to be served and is likely to allow the school to enroll sufficient numbers of students who are representative of either the surrounding zoned schools or a mission-specific educationally disadvantaged population.*
- *Complies with Nevada laws and regulations regarding enrollment, including but not limited to*
 - *Mailers sent to all households with children within a 2-mile radius of each facility.*
 - *Minimum 45-day notification period followed by 45-day enrollment period OR a combined 90-day notification and enrollment period.*
- *Demonstrated interest and intent to enroll commitments by a significant number of parents for Year 1. These forms should include the following information at minimum:*
 - *Parent name and contact information*
 - *Zip code of residency*
 - *Student name(s) and grade levels for the proposed opening year*
- **Incubation Year Development**
 - *Provides key milestones for the planning year, as well as concrete actions and accountability, that will ensure that the school is ready for a successful launch. These plans should identify the individuals responsible for leading Year 0 initiatives. If a third party (EMO/CMO) is going to implement portions of the Year 0 plan, the committee to form has provided documentation that articulates related terms and services.*
 - *Outlines comprehensive leadership development plans that include training aligned with incubation year goals as well as stated academic goals (these may be either designed by or outsourced by the operator)*
 - *Outlines the function of any employees in Year 0, as well as the funding source for associated compensation*
 - *The staffing outlined for Year 0 will enable the school to reach its Year 0 milestones and goals*
 - *Startup expenses are reflected in the budget narrative assumptions and the budget calculations*
- **Services**
 - *Operations plan includes logical plans for all essential and program-specific non-academic services, including, but not limited to:*
 - *Supporting transportation, food service, facilities management, nursing, and purchasing processes, and school safety.*
 - *Staff structure/plan is adequate for the proposed school and aligns with the educational program; lines of authority are clear.*
 - *IT plans should include consideration of:*
 - *User access control policies, limitation of access rights and procedures for removing access from departing employees.*
 - *Policies for data stored on personal and portable devices aimed at minimizing inadvertent disclosing of information, such as theft or misplaced equipment.*
 - *Strategy for information backups and disaster recovery.*
 - *Intruder prevention strategies, including physical and electronic intrusion.*
 - *Malware and malicious software prevention and removal strategy.*

- *An effective plan for managing student information, including Infinite Campus, evidence of contact with the vendor to price and arrange for training, and the provision of appropriate on-site on contract staffing and support resources and an information security plan for staff, students, parents, and contractors.*
 - *Clear plans that confirm compliance with NRS 385A.800*
 - *Costs of services are realistic and align with budget and academic program.*
 - *Committee to form articulate clear metrics and process for evaluating effectiveness of services.*
- **Facilities**
 - *Identifies a viable educational facility or facilities that meets the needs of the students and accommodates the programmatic and operational needs of the school(s) over the charter term as described throughout the application—OR—outlines in detail the plan and timeline to identify and secure facilities as needed*
 - *Provides facilities costs including, as applicable, cost of purchasing, leasing, building, or renovating an educational facility that conforms to applicable health, safety, and occupancy requirements*
 - *If a facility has been identified*
 - *Evidence that facility will be appropriate for the educational program of the school and adequate for the projected student enrollment*
 - *Adequate reflection of the costs associated with the proposed facility in the budget including rent, utilities, insurance and maintenance.*
 - *If a facility has not yet been identified*
 - *Inclusion of costs associated with the anticipated facilities needs in the budget including renovation, rent, utilities, insurance and maintenance.*
 - *Evidence to indicate that facilities-related budget assumptions are realistic based on anticipated location, size, etc.*
 - *Assurance that the proposed location will be in compliance with applicable building codes, health and safety laws, and with the requirements of the American with Disabilities Act (ADA).*
 - *Plan for finding a location including a proposed schedule for doing so.*
 - *A clear, time bound plan to engage with local jurisdiction(s) and municipalities.*
- **Ongoing Operations**
 - *Safety and security plans likely to ensure a safe environment for people and property that corresponds with the core elements of the state-mandated school safety plan and the requirements in statute and regulation.*

Financial Plan

- *The charter committee to form protects mission-critical expenses when faced with budget cuts.*
- *All funds from external sources are guaranteed with money in hand or letter of award and grant terms.*
- *No essential services are funded at amounts that would preclude the committee to form from implementing their plan.*
- *There is no evidence that the school ever will become insolvent or lack access to the necessary amount of liquidity.*

Addendum

- **Leadership for Expansion**
 - *Criteria for evaluating readiness for expansion are comprehensive and demonstrate high expectations for academic, financial, and organizational performance.*
 - *Evidence is provided that that CMO/EMO is ready to expand according to the articulated criteria for evaluating readiness.*
 - *Academic Performance data for schools affiliated with the CMO/EMO demonstrate strong performance equivalent to 4- or 5-star performance on the NSPF.*
 - *Organizational Performance data for schools affiliated with the CMO/EMO demonstrate strong performance equivalent to a rating of 'meets standard' on the SPCSA's Organizational Performance Framework.*
- **Scale Strategy**
 - *The plan to scale the model to new sites is adequately resourced and staffed appropriately.*
 - *Previous scale-up endeavors are shown to have been successful with student performance data and organizational financial data (if applicable).*
 - *Includes plan to infuse NV schools with the essential elements of the organization's model.*
 - *Organization has sufficient infrastructure (or plan to develop same) to support the proposed network of schools, including shared services and the costs associated with them.*
 - *Organization charts clearly indicate lines of authority between the board, network, and schools.*
- **School Management Contracts**
 - *Clear rationale for selection of Educational Management Organization (EMO/CMO)/Charter Management Organization (CMO)*
 - *Clear, appropriate delineation of roles and responsibilities between the management organization and the school site(s)*
 - *Demonstrates capacity and commitment of the governing board to oversee the EMO/CMO effectively:*
 - *Plan for board to monitor/evaluate the EMO/CMO's performance*
 - *Appropriate internal controls guide the relationship*
 - *Describes how the governing board will ensure fulfillment of performance expectations*
 - *Discloses and addresses any potential conflicts of interest (real or perceived)*
 - *Clearly outlines the roles/responsibilities of the EMO/CMO in the year prior to the school's opening. The committee to form provides a Memorandum of Understanding (MOU) that lists specific*
 - *There are no prohibited familial relationships between charter holder board members and EMO/CMO employees within the third degree of consanguinity or affinity nor any supervisory or business relationships between charter holder board members or relatives of such and relatives of EMO/CMO employees within the third degree of consanguinity or affinity.*
 - *Clearly defined contract terms including: contract duration; roles and responsibilities of the school governing board, school staff, and EMO/CMO-specific services and resources to be provided by the EMO/CMO; performance evaluation measures and mechanisms; compensation to be paid to the provider; financial controls and oversight; methods of contract oversight and enforcement; investment disclosure; and conditions for renewal and termination of the contract, and alignment of the key performance indicators for the EMO/CMO and the hierarchy of sanctions for poor performance with the SPCSA academic, financial, and organizational frameworks and intervention ladder. SB509 requires that a*

management relationship and a management contract may not jeopardize a school's eligibility to qualify for 501c3 status. The IRS has several criteria which are used by the Authority:

- *A charter school must show that contracts, especially comprehensive management contracts, have been negotiated at arm's length and are for the benefit of the school rather than the service provider. The IRS has determined that boilerplate contracts may be an indicator that the terms of the contract were not the subject of negotiations between independent parties; the applicant must provide clear and compelling evidence that the contract submitted is not a boilerplate contract.*